LMCRMInbound

User Manual

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1 Introduction

LMCRMInbound module is able to manage requests send to your company, like technical support request, need information request, etc. etc. .
Module needs a license key to work. This key has to insert in setting page.

2 Description

LMCRMInbound module functionality:

- Ticket insertion (by special kind of site user called supervisor and operator) to ask services or technical support to your company.
- Ticket Management.

First step required a ticket insertion page. Who can insert ticket:

- A customer (registered to DotNetNuke site). In this case (some) insertion ticket field will be the same of profile user field.

- A supervisor/operator user that was contacted directly (or e-mail) by a customer.

Either supervisor or operator associated to ticket can manage each ticket change of state. Customer that has created ticket can be warned (by e-mail) about a ticket change of state.

An inserted ticket can be assigned to a specific operator: this one can be different from who has inserted ticket because of he can't be the right operator to solve ticket request.
An operator can manage all and only ticket assigned to him, otherwise supervisor can manage all tickets and can be assigned a ticket to a specific operator.

3 Views

Supervisor and Operator users see similar views. Differences are described in 'User Roles' paragraph.
Screenshots below refers to pages as seen by a user supervisor.

3.1 Customer

To access customer page and to all sub-pages, click **Customer** link:

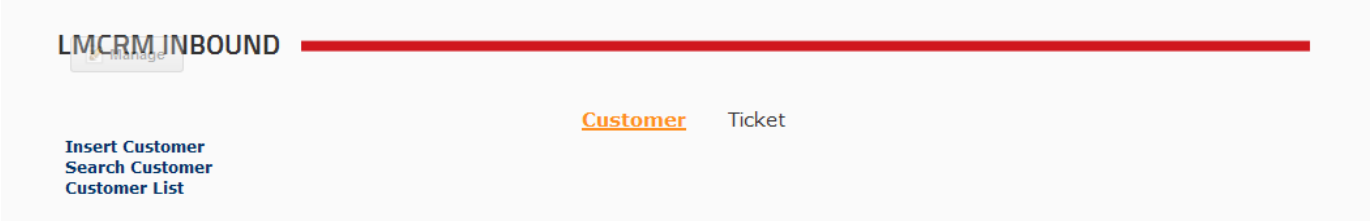


Figure 1: Customer

Use left side link to access to one of three sub-pages: 'Insert Customer', 'Search Customer' and 'Customer List'.

3.1.1 Insert customer

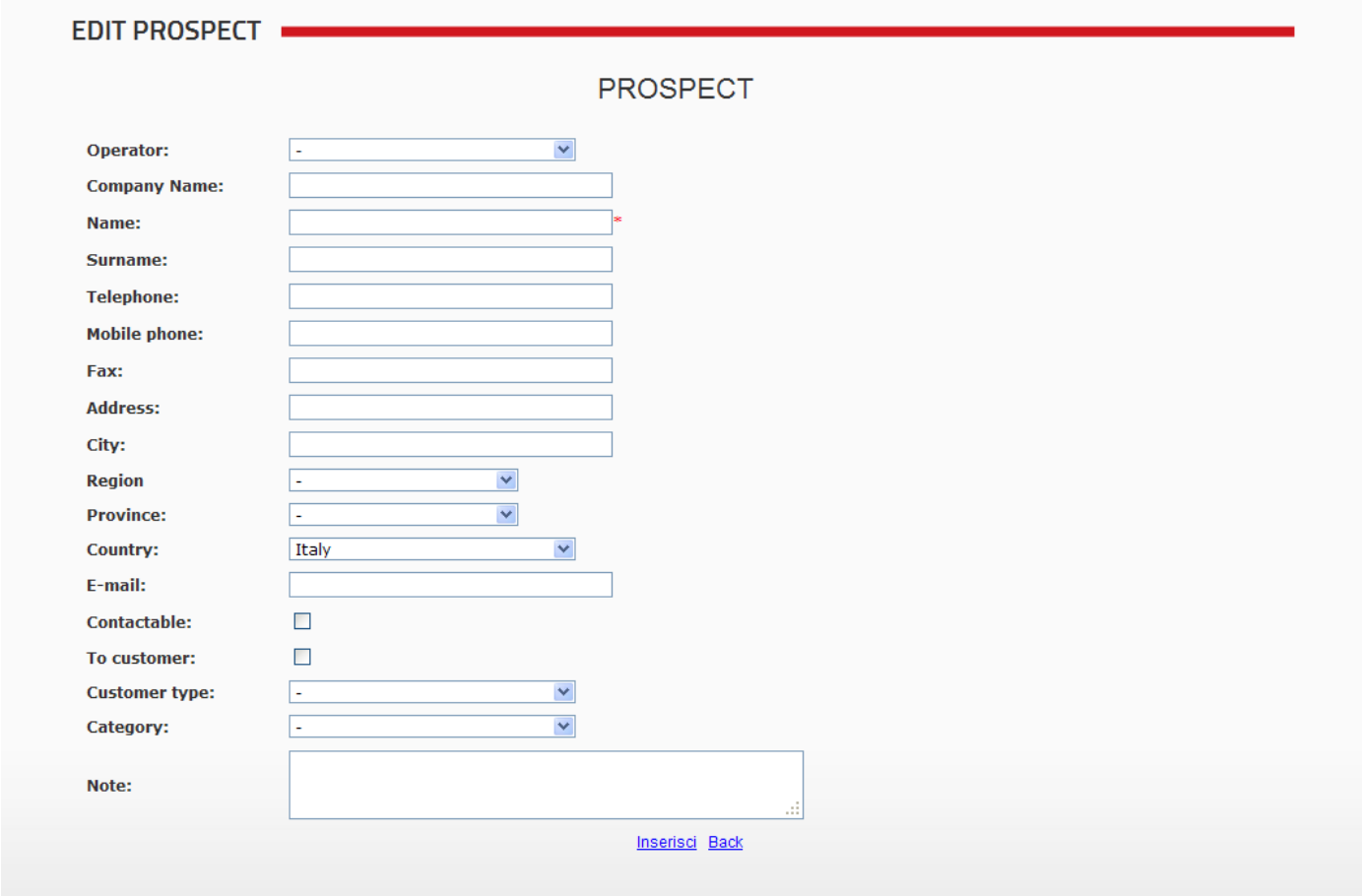


Figure 2: Insert customer

Use this page to insert a customer (also called 'prospect'). A customer is a person/client/company that inserts a ticket to ask for support or technical information, etc. etc.
Customer registry is not linked to DotNetNuke user registry.
This page contains general information about customer (company name, name, surname, address, etc. etc.). Only name is mandatory.
Supervisor only can associate a customer to an operator, in this case also operator will be able to manage customer information.
Contactable flag indicates if user can be directly contacted. *Customer* flag indicates if customer is already a client or a potential client of your company.
At last, you can specify a *Customer type* and a *Category*.

3.1.2 Search Customer

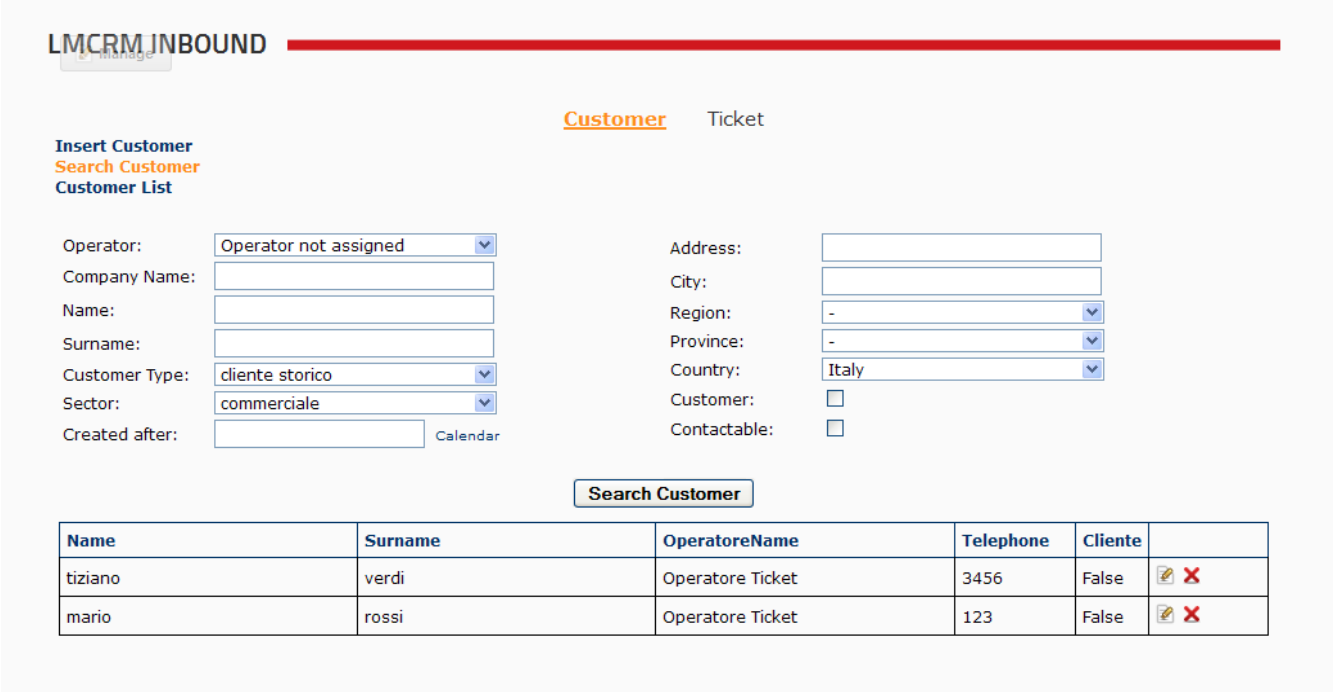


Figure 3: Search Customer

This view permits to search between customers. Each search fields are described below:

- *Operator* eventually associated to customer
- general info about customer (*company name, name, surname, address*, etc. etc.)
- *Customer type* (example 'new customer', 'potential customer', etc. etc.)
- *Sector*: sector to which customer belong to.
- *Created after*: all customers inserted after specified date.
- *Customer*: checked if customer is already client.
- *Contactable*: customer can be directly contacted by operator.

Buttons on the right side of each row permit to modify/delete a specific customer.

3.1.3 Customer general list

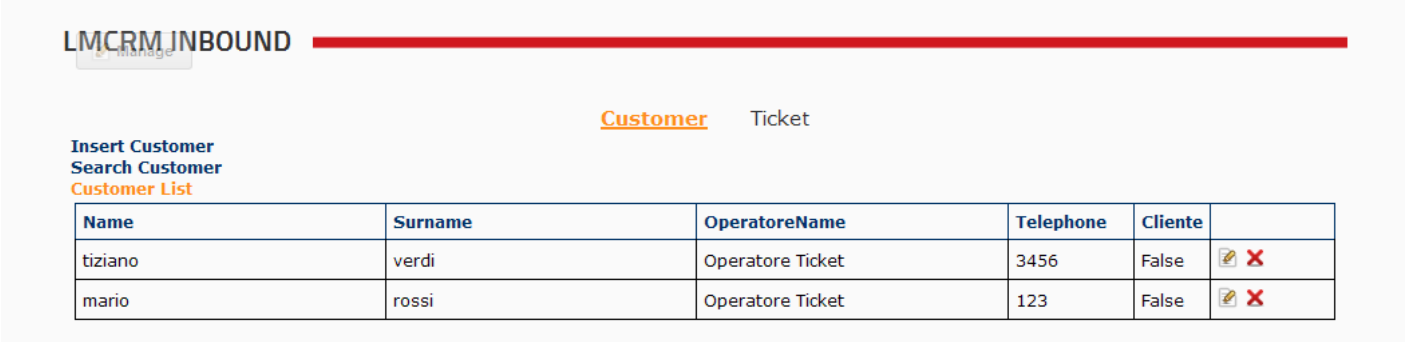


Figure 4: Prospect/Customer General List

Supervisor users see all customers, operator users see only customers associated to him
Buttons on the right side of each row permits to modify/delete a specific customer.

3.2 Ticket

To access to ticket view with all sub-views, click ‘Ticket’ link in top menu:

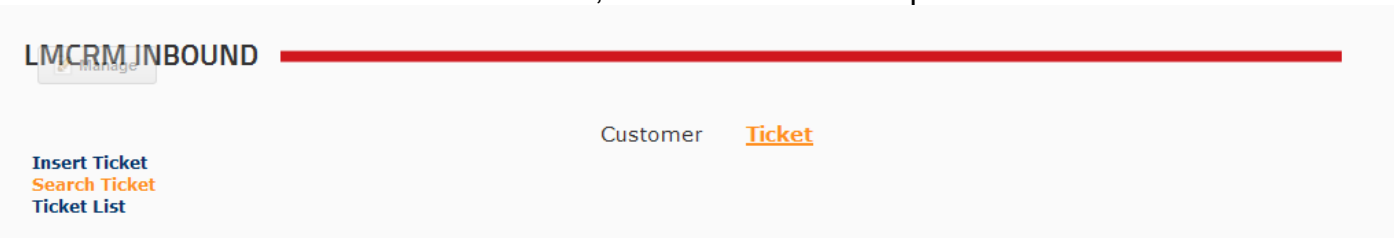


Figure 5: Ticket View

As you see, links on left side permit to access to three sub-view: ‘Insert Ticket’, ‘Search Ticket’ and ‘Ticket List’.

3.2.1 Insert Ticket

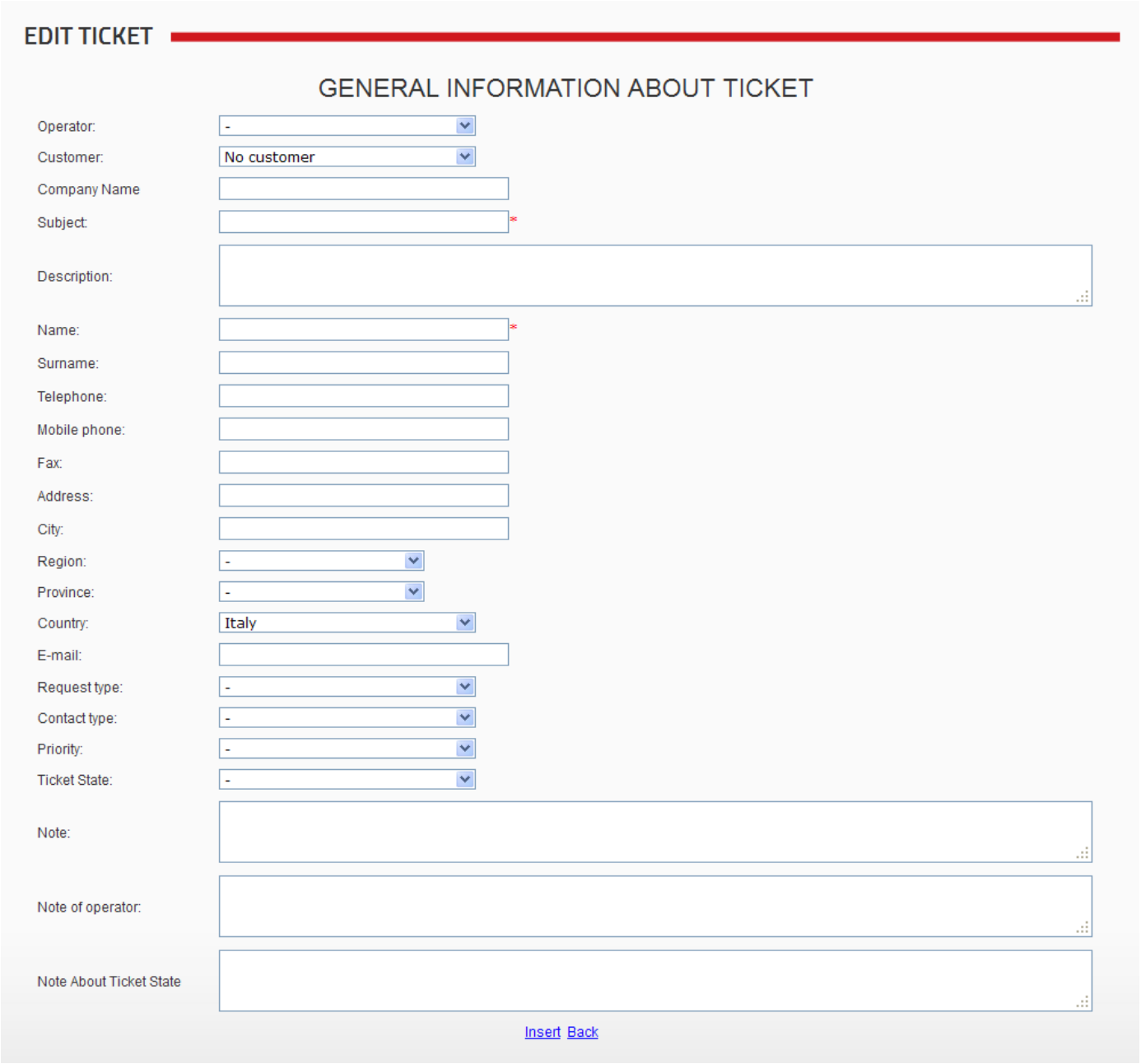


Figure 6: Add Ticket

This view permits to insert a ticket. Fields are described below:

- *Operator*: user that manages ticket. If this field is empty, only supervisor can manage ticket. In general only a supervisor can associate an operator to a specific ticket.
- *Customer:* user that inserts ticket or to which ticket refers to. If I select an existing customer, some values of ticket field (like person/company name, address, etc. etc.) will be filled with customer values (editable), in the other case values are free.

- *Name* and *Subject* are mandatory.
- *Contact type*: Modality to contact a customer (example an operator can contact a customer by e-mail, direct contact, telephone, etc. etc.)
- *Request type*: Ticket refers to argument specified in this field (example: general info, sales info, support, etc. etc.)
- *State*: Ticket state (example: open, in progress, closed, etc. etc.)
- *Priority*: Urgency level for a ticket resolution.
- *Note, Note of operator*
- *Note About Ticket State:* notes about a specific change of ticket state.

3.2.2 Search Ticket

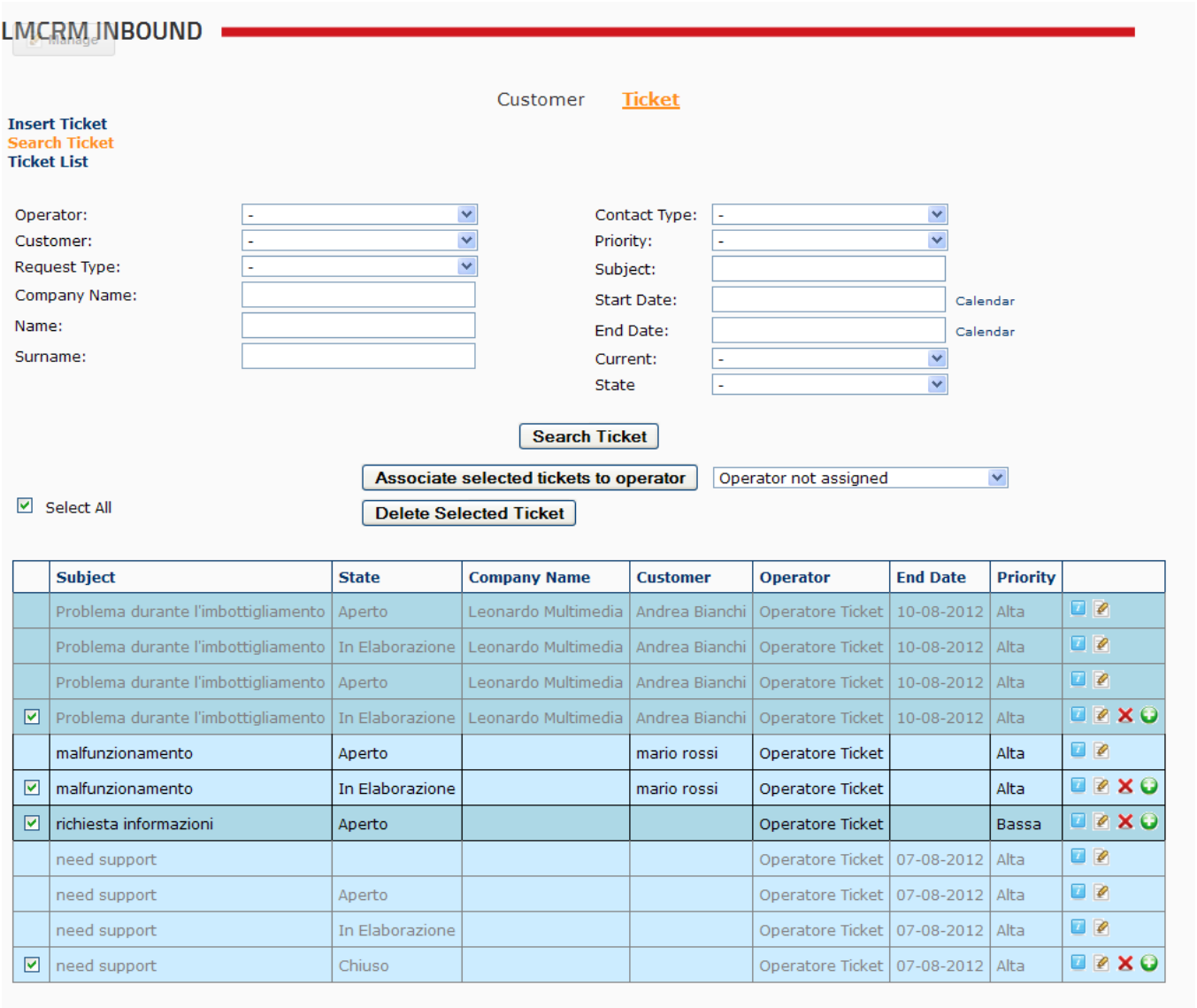

LMCRM INBOUND
Customer
Ticket
Insert Ticket
Search Ticket
Ticket List
Operator:
Customer:
Request Type:
Company Name:
Name:
Surname:
Contact Type:
Priority:
Subject:
Start Date:
End Date:
Current:
State
Calendar
Calendar
Search Ticket
Associate selected tickets to operator
Operator not assigned
Select All
Delete Selected Ticket
Subject
State
Company Name
Customer
Operator
End Date
Priority
Problema durante l'imbottigliamento | Aperto | Leonardo Multimedia | Andrea Bianchi | Operatore Ticket | 10-08-2012 | Alta
Problema durante l'imbottigliamento | In Elaborazione | Leonardo Multimedia | Andrea Bianchi | Operatore Ticket | 10-08-2012 | Alta
Problema durante l'imbottigliamento | Aperto | Leonardo Multimedia | Andrea Bianchi | Operatore Ticket | 10-08-2012 | Alta
Problema durante l'imbottigliamento | In Elaborazione | Leonardo Multimedia | Andrea Bianchi | Operatore Ticket | 10-08-2012 | Alta
malfunzionamento | Aperto | | mario rossi | Operatore Ticket | | Alta
malfunzionamento | In Elaborazione | | mario rossi | Operatore Ticket | | Alta
richiesta informazioni | Aperto | | | Operatore Ticket | | Bassa
need support | | | | Operatore Ticket | 07-08-2012 | Alta
need support | Aperto | | | Operatore Ticket | 07-08-2012 | Alta
need support | In Elaborazione | | | Operatore Ticket | 07-08-2012 | Alta
need support | Chiuso | | | Operatore Ticket | 07-08-2012 | Alta

Figure 7: Search Ticket

This view permits to search between tickets. Each search fields are described below:

- *Operator*: user that manages tickets. This field is visible only by supervisor, while operators can view only their tickets.
- *Customer*: user that inserts ticket or to which ticket refers to.
- *Modality request*: Ticket refers to argument specified in this field (example: general info, sales info, support, etc. etc.)
- *Company name, Name, Surname:* information about person/company that has inserted the ticket (ticket can be associated or not to a customer: in the first case values of information field are the same of customer (editable), in the other case values are free).
- *Contact Type*: List of modality to contact a customer (example an operator can contact a customer by e-mail, direct contact, telephone, etc. etc.)
- *Priority*: Urgency level for a ticket resolution.
- Ticket *Subject*.
- *Closing date* and *Insertion date*: return list of tickets which validity range (period between insertion date and closing date) intersects period between 'start date' and 'end date' (you can specify only one date).
- *Current: Current, Expiring* (Expiring means that closing date is approaching actual date, in other word difference between closing and actual date is minor than number of days specified in 'Expiring Ticket Alert (days)' field in Module Settings), *Expired* (closing date in the past: tickets have grey background).

State: List of ticket state (example: open, in progress, closed, etc. etc.)

View has functionality described below.

3.2.2.1 Associate selected ticket to a specific operator.

Selected tickets are associated to selected operator (or disassociate to all operators). Only supervisor users have this functionality.
By checking last row flag for a ticket, you select entire ticket, NOT last ticket state.

3.2.2.2 Deleting selected ticket

Deleting tickets is permitted only if flag 'Tickets can be deleted' (see Settings) is checked.

Buttons in the right columns (see figure 7) permit to: view ticket state details, modify ticket, delete last inserted state, **add new ticket state** (see '+' button on green background). This last state is described below.

3.2.2.3 Adding a new ticket state

This view is substantially the same of ticket insertion:

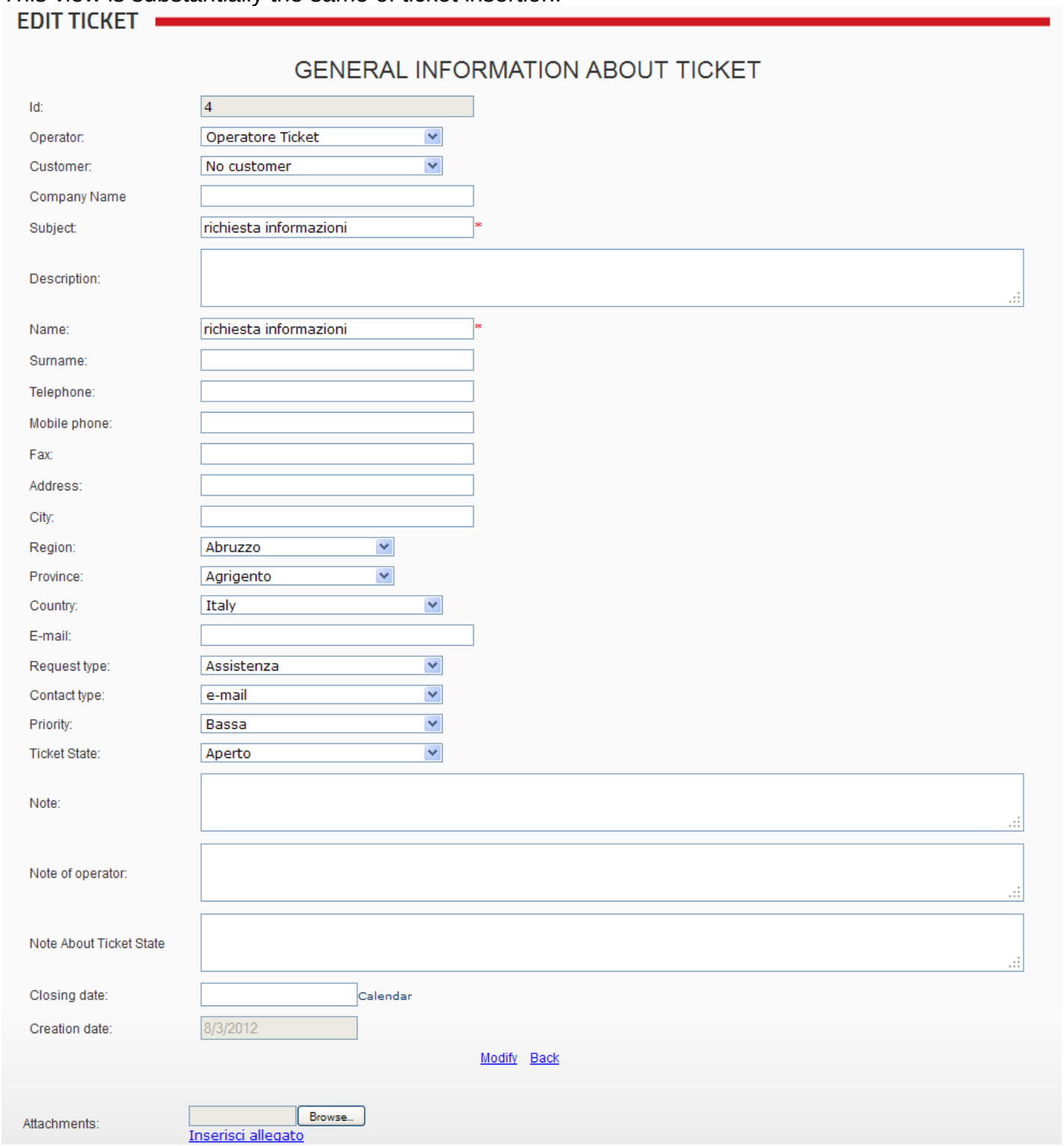
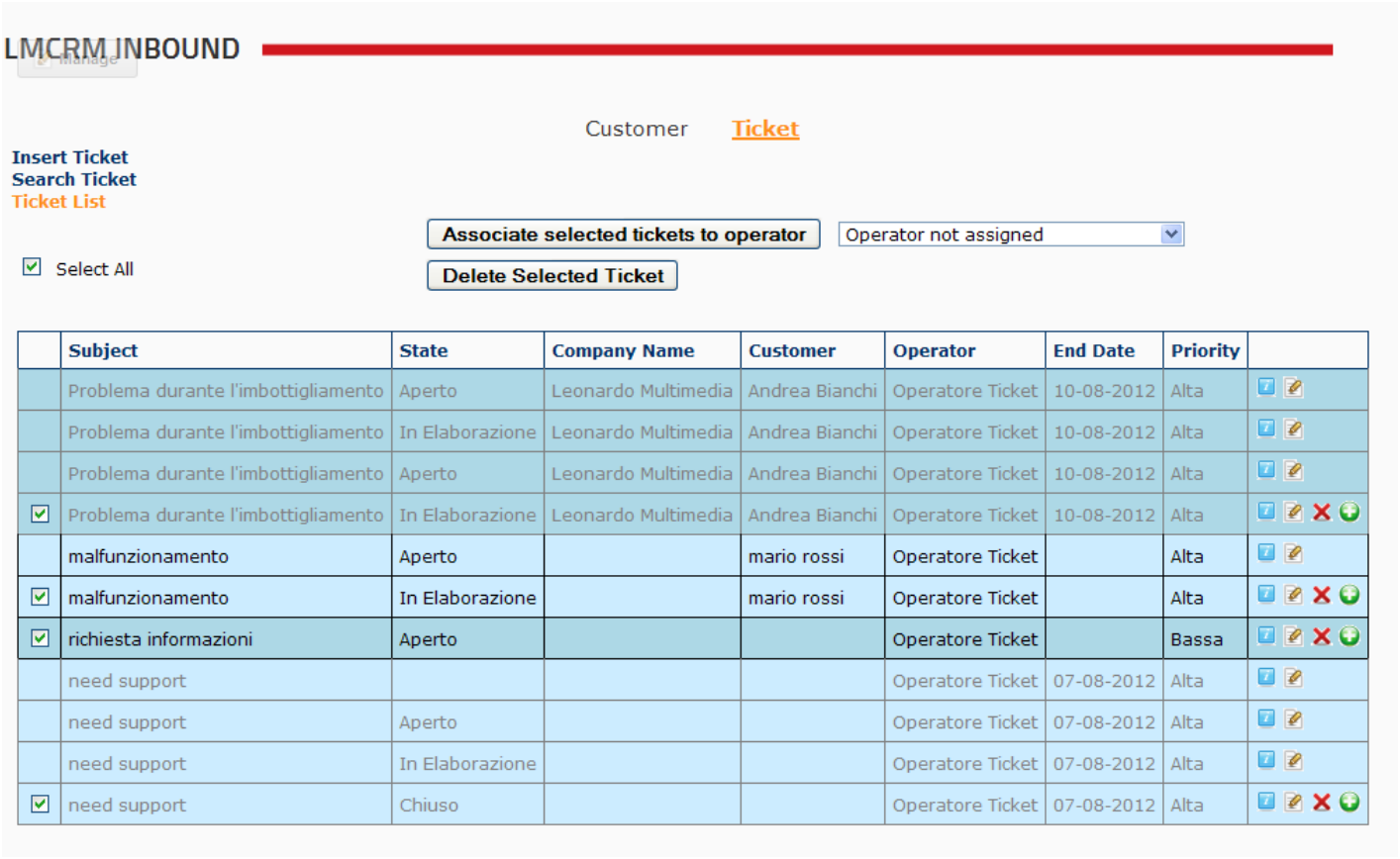


Figure 8: Add new ticket state

with the addition of some fields: *Closing date* (editable), *Creation date* (not editable), *Attachments* (this field refers to entire ticket, not to single state), *Note About Ticket State* (refers to a **specific ticket state**, not to the entire ticket).

3.2.3 Tickets List


LMCRM INBOUND
Customer
Ticket
Insert Ticket
Search Ticket
Ticket List
Associate selected tickets to operator
Operator not assigned
Select All
Delete Selected Ticket
Subject
State
Company Name
Customer
Operator
End Date
Priority
Problema durante l'imbottigliamento | Aperto | Leonardo Multimedia | Andrea Bianchi | Operatore Ticket | 10-08-2012 | Alta
Problema durante l'imbottigliamento | In Elaborazione | Leonardo Multimedia | Andrea Bianchi | Operatore Ticket | 10-08-2012 | Alta
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malfunzionamento | Aperto | | mario rossi | Operatore Ticket | | Alta
malfunzionamento | In Elaborazione | | mario rossi | Operatore Ticket | | Alta
richiesta informazioni | Aperto | | | Operatore Ticket | | Bassa
need support | | | | Operatore Ticket | 07-08-2012 | Alta
need support | Aperto | | | Operatore Ticket | 07-08-2012 | Alta
need support | In Elaborazione | | | Operatore Ticket | 07-08-2012 | Alta
need support | Chiuso | | | Operatore Ticket | 07-08-2012 | Alta

Figure 9: Ticket List

Supervisor users can view all tickets, while operator users view (and search) only their tickets.
Buttons in the right columns permit to: view ticket state details, modify ticket, delete last inserted state, add new ticket state.

4 User Roles

Roles are two: “**Supervisore Inbound**” and “**Operatore Inbound**”. Each role is a DotNetNuke role so you can associate user to roles by using usual DotNetNuke view. Roles are automatically created during module installation. Roles automatically gain ‘Modify’ role (to the module) during module installation.

Supervisor and operator users access to same view, only difference is that supervisor user can develop more tasks, as described below:

- ‘**Insert Customer’** view: all roles can insert a customer, only difference is that supervisor user can associate an operator to a customer, while customer inserted by an operator is automatically associated to operator itself.
‘Search Customer’ and ‘General Customer List’ view: supervisor users view all customers while operator users view (and search) only their customers.

- ‘**Insert Ticket’** view: each user belonging to “**Supervisore Inbound**” and “**Operatore Inbound”** roles can insert a ticket, only difference is that supervisor user can associate an operator to a ticket, while ticket inserted by an operator is automatically associated to operator itself.
- ‘**Search Ticket’** and ‘**Ticket General List’**: supervisor users can view all tickets while operator users view (and search) only their tickets.

5 Settings

Access to this view by pressing ‘Settings’ link (figure refers to DotNetNuke 6). Supervisor user must belong to ‘administrator site’ role.

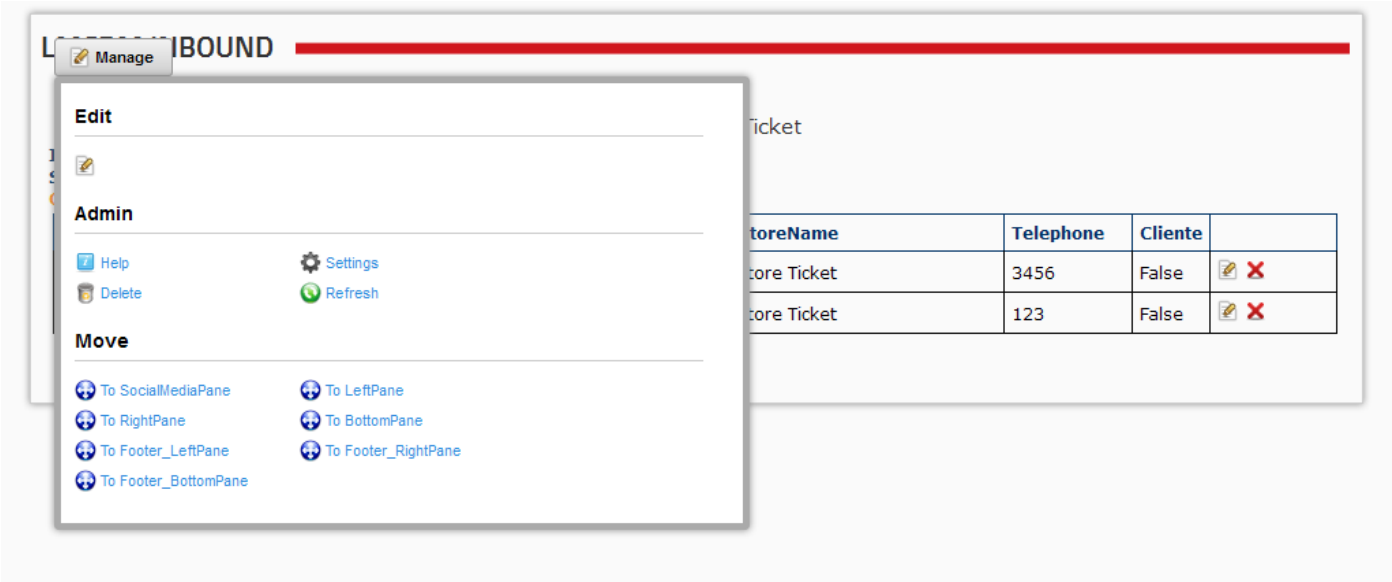

Figure 10: Access to Settings Page

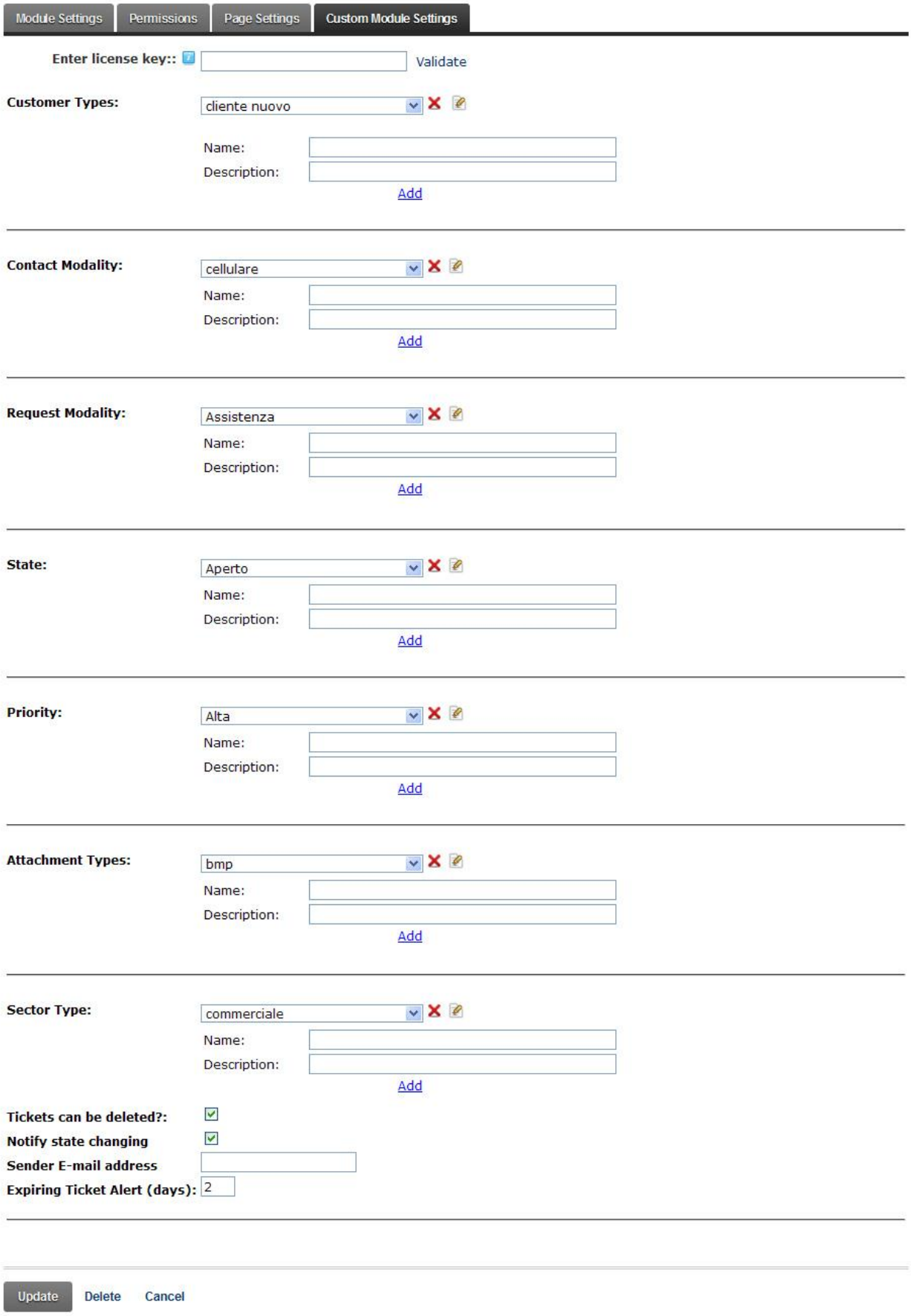
Module Settings
Permissions
Page Settings
Custom Module Settings
Enter license key::
Validate
Customer Types:
cliente nuovo
Name:
Description:
Add
Contact Modality:
cellulare
Name:
Description:
Add
Request Modality:
Assistenza
Name:
Description:
Add
State:
Aperto
Name:
Description:
Add
Priority:
Alta
Name:
Description:
Add
Attachment Types:
bmp
Name:
Description:
Add
Sector Type:
commerciale
Name:
Description:
Add
Tickets can be deleted?:
Notify state changing
Sender E-mail address
Expiring Ticket Alert (days):
2
Update
Delete
Cancel
Created By SuperUser Account On 8/9/2012 3:34:56 PM
Last Updated By SuperUser Account On 8/9/2012 5:06:35 PM

Figure 11: Settings

License Key: you must insert a license key to use this module.
Customer type: type of customer/client (example ‘new customer’, etc. etc.)
Contact Type: List of modality to contact a customer (example: an operator can contact a customer by e-mail, direct contact, telephone, etc. etc.)
Modality request: Ticket refers to argument specified in this field (example: general info, sales info, support, etc. etc.)
State: List of ticket state (example: open, in progress, closed, etc. etc.)
Priority: Urgency level for a ticket resolution.
Attachment type: Attachment type of files eventually associated to ticket.
Sector type: Tickets are eventually associated to a specified sector type, like merchandising type, etc. etc.
Tickets can be deleted: If checked, tickets can be deleted.
Notify state changing: If checked, notify customer associated to ticket about each change of ticket state.
Sender E-mail address: E-mail address in ‘from’ field in e-mail notifying change of ticket state.
Expiring Ticket Alert (days): Alert operator if expiring date is approaching actual date (difference is minor than specified number of days).